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Wealthtech Weekly

December 5, 2024

By Rob Burgess
Reporter

Last month, I had the opportunity to host my first "Leaders" discussion, which is a forum that brings together innovators and senior voices to share their leadership experiences and perspectives on today's most pressing topics.

My guest was Natalie Wolfsen, CEO of Orion, who discussed how advisors can marry tech with personalization to build deeper connections with clients.

The video and transcript are now available on demand. I hope you'll check them out, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

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TOP STORIES

LEADERS

Adapting to client needs in the digital age

How advisor can utilize technology to deliver personalization at scale.

- **Financial advisors find fulfillment in pro bono planning work**
  Advisors who have volunteered their time and expertise said they have reaped the rewards along with those they have served.
- **Goldman Sachs on what 2025 might bring for markets**
  With interest rate easing cycles, geopolitical risk and post-election policies, experts looked forward to what's ahead in the new year.
- **Short-term bonds on the rise as interest rates decline**
  As investors think about moving cash out of money market funds, a low-duration strategy could make sense.
- **Wealth firm searches for integrations: Show Me Your Stack**
  Chris Grellas co-founded ProsperPlan Wealth in April in Gold River, California, and is seeking vendors who will communicate well with one another.

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